

USING TEMPLATES IN ZIMS FOR RECORDING AND TRACKING INFORMATION

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Abstract

Managing animals in a zoo setting is a data-intensive activity. Several record-keeping systems have been developed for use in zoos and aquariums, one of which is called the Zoological Information Management System (ZIMS). Utilizing the template feature of ZIMS helps to track diet information easily when zoo staff are already making notes daily. The template feature has the ability to be set up in advance and include all of the information needed for capturing data on development, nutrition, health, behavior, and more. Using this feature makes sure that each time a management activity takes place, the same information is recorded accurately, easily, and not forgotten. The template feature especially has great value in nutrition management.

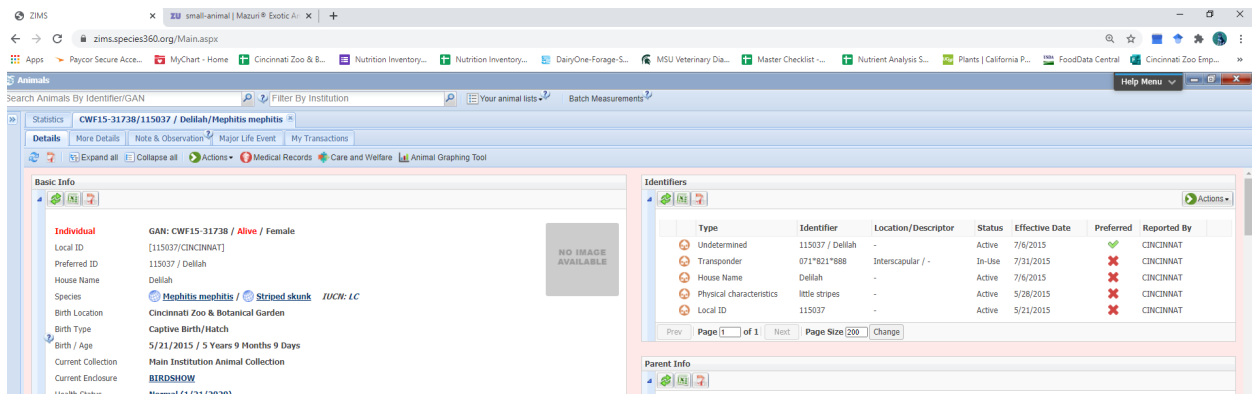
Introduction

Having all the animal information easily and effectively recorded in one program is the goal of the Cincinnati Zoo & Botanical Garden (CZBG) staff. Therefore, understanding how to utilize different features in ZIMS is important. This paper hopes to share an easy-to-use feature with outlined instructions using pictures as prompts. Earlier this year CZBG received a Verreaux's Eagle owl (*Bubo lacteus*) egg. Before the egg arrived, the information deemed necessary was discussed and included in the template. Using this template allowed consistent information to be recorded daily and each person reading the records were getting complete information on consumption, growth, and development.

Procedure

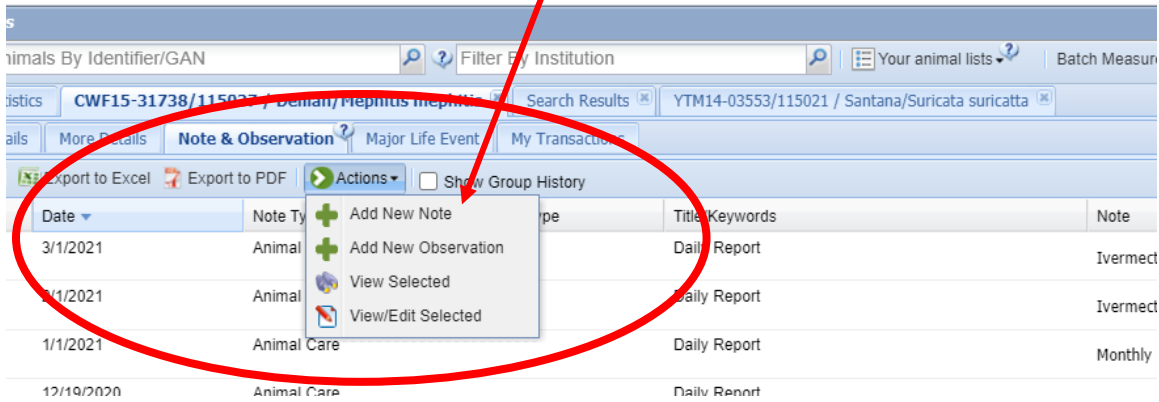
Creating a template in ZIMS is fairly straightforward. The steps are provided in the following outline.

1. To create a template:
 - a. Open your chosen animal's record in the animal module. You can create a template in any animal's record you choose, and that template will be available to use for all animals in ZIMS.

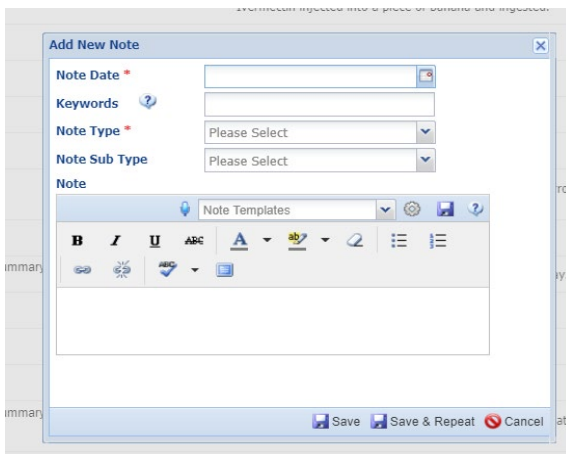


(Examples are for the Delilah the skunk since the owl egg had not hatched yet when this example was developed)

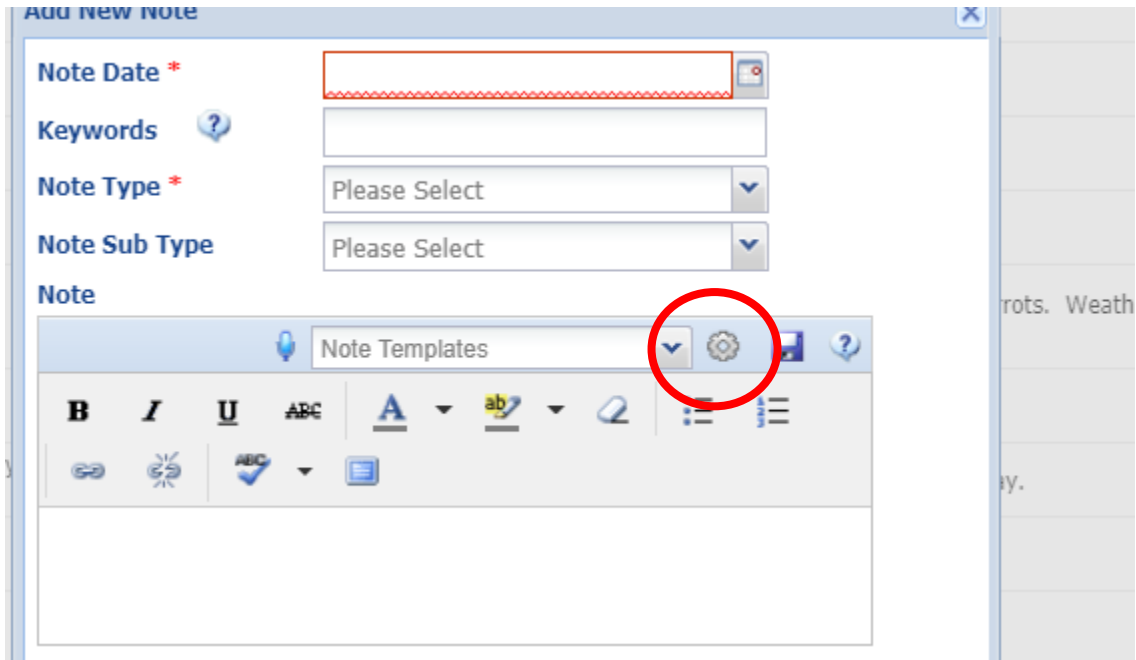
- b. Select the “notes & observation” tab
- c. Click “actions”, then “add new note”



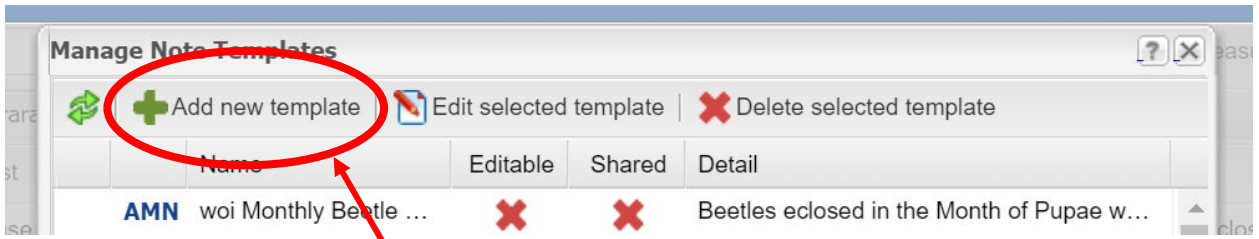
- d. This is what you will see now



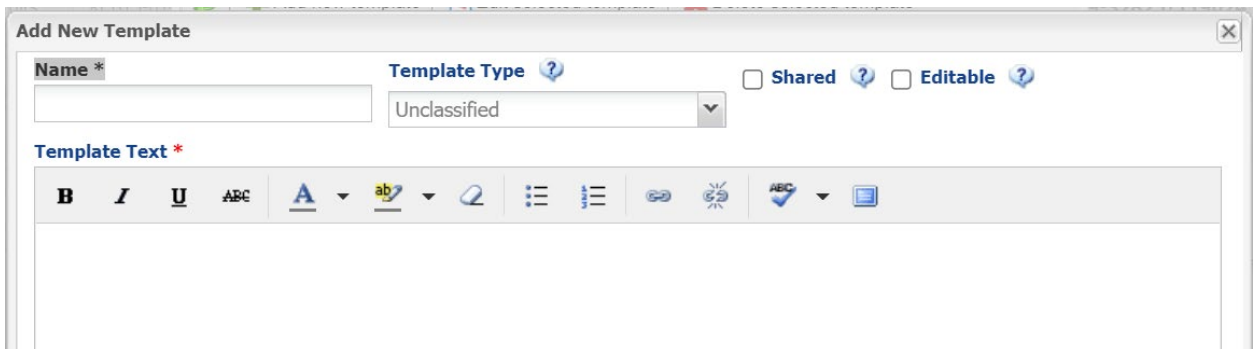
e. Click the gear picture



f. The window "Manage Note Templates" will open.

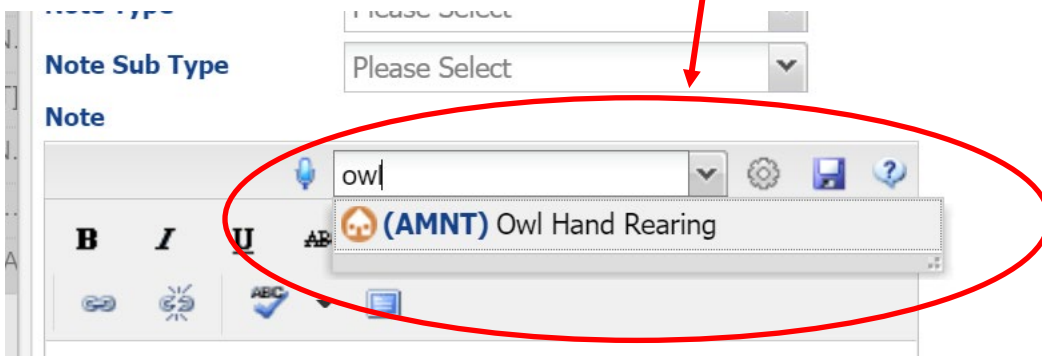
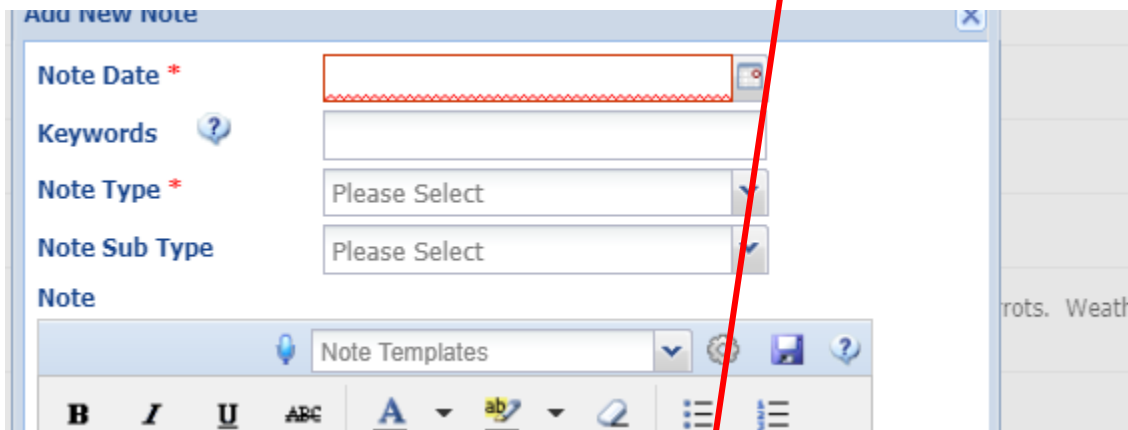


g. Click "add new template"; a new window will open

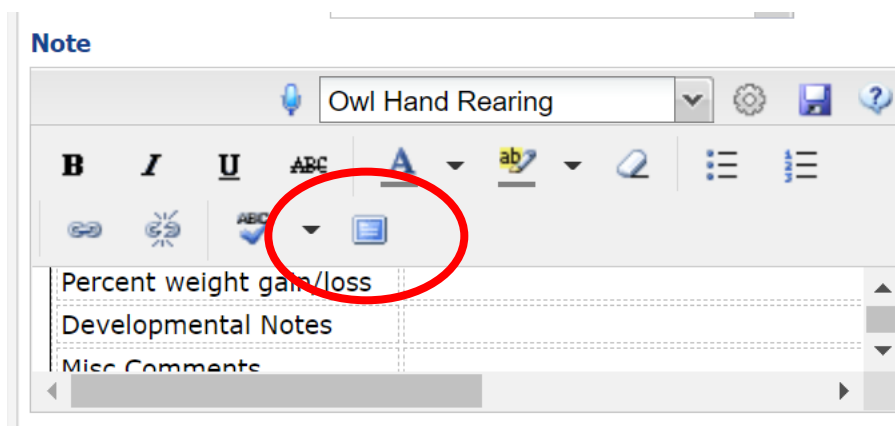


- h. Type in the template name in the “Name” box; select template type (if applicable)
 - i. Click “shared” if others in your institution will be using it and click “editable” if you are planning to edit the content later.
 - j. Fill in the “template text” area with the template you would like. This can be a table, list, fill in sentence, etc.
 - k. Click “save” – done! (you will then need to close the manage note templates window (via the “x” at the top right and then cancel the animal note window that was opened)
2. To enter information in a template in ZIMS:
- a. Add a note to the animal – this can be done in one of two ways:
 - i. Open your animal’s record in the animal module, select the “notes & observation” tab, click “actions”, select “add new note”
 - ii. If you are using the “your animal lists” portion: Select the relevant animal list, select the animal in your animal list; go to “actions”, “record batch transaction”, “notes”, click “single entry for all animals”
 - b. Add the note date and note type (each institution has their own protocols for which note type is appropriate)

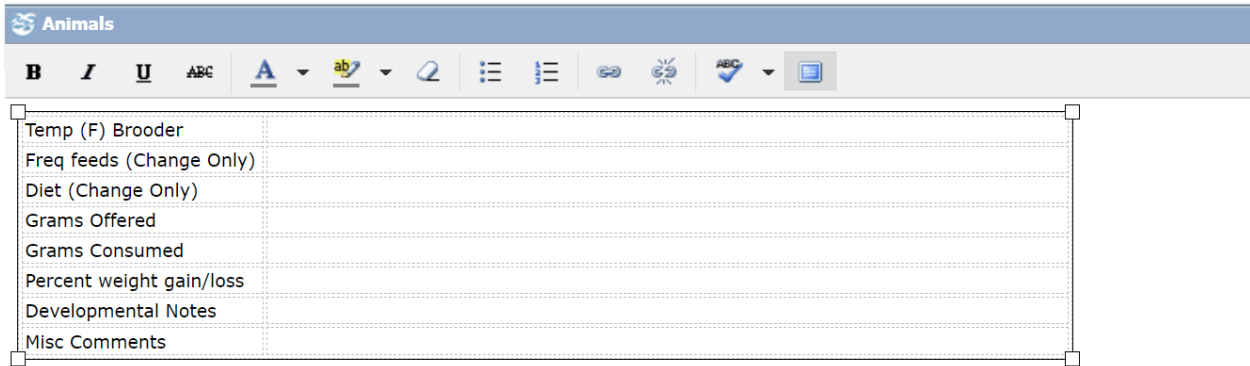
- c. Click in the box “note template” and start typing the name of the template that was created for this purpose – in this instance, “Owl Hand Rearing” was used. Select the template that shows up in the dropdown.



- d. A table will be added to the note area (this template was created as a table, but that is not necessary – a list may be used as well). You may not be able to see the full table, but the screen can be expanded: If you click on the blue box that looks like a computer screen, you will open in full screen which is easier to add information



e. Now you will see this

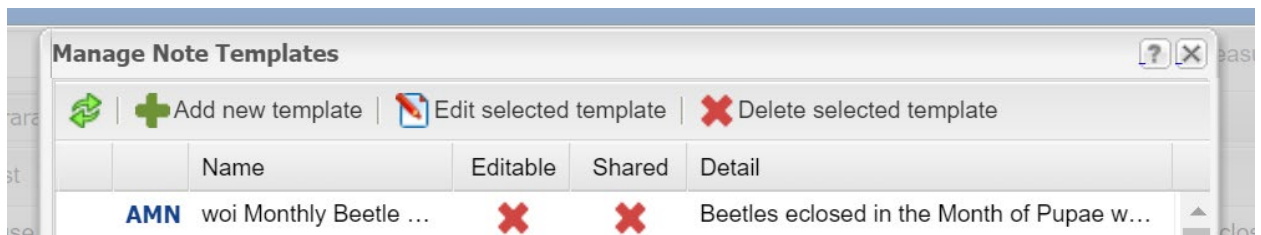


Temp (F) Brooder	Freq feeds (Change Only)	Diet (Change Only)	Grams Offered	Grams Consumed	Percent weight gain/loss	Developmental Notes	Misc Comments

- f. Click in the table and add your information. If you don't need to add something to a line you may skip that. For example, you may feed 6 times for several days to a week so once you have written that you would not need to add that daily.
- g. **VERY IMPORTANT** to remember that once you have entered your information click that computer screen box again to make it small again, so you are able to save the data you entered.
- h. Click "save"
- i. Boom you are finished! You have entered your information into a ZIMS template. Look at you go!

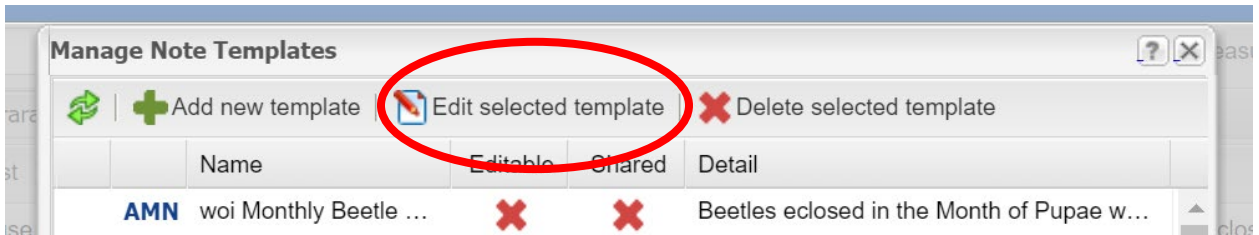
To edit templates:

1. Follow steps 1a-f.
2. The window "Manage Note Templates" will open.

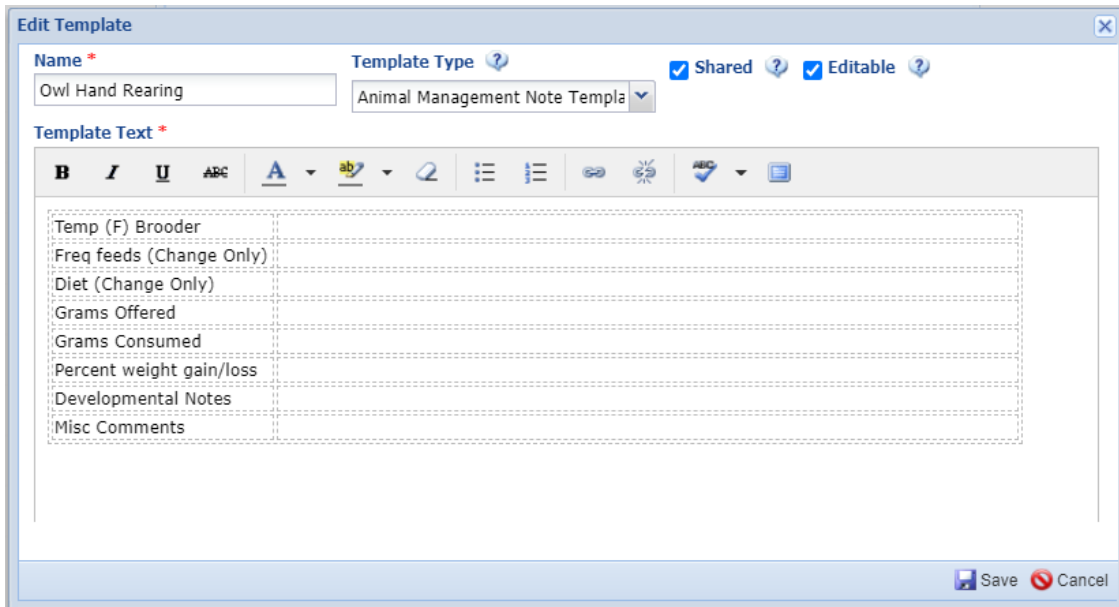


3. The list you will see is alphabetical by name. Scroll until you see the template you want and click on it to highlight it.

4. Select “edit selected template”



5. A new window will open:



6. Click in the “template text” area and edit as needed.
7. Click “save”
8. Click the “x” at the top right of the “Manage Note Templates” window
9. If you only wanted to edit the template and do not need to add a note to your selected animal, click “cancel”.
10. If you did want to make a note / use a template – you can move forward as normal.

Conclusion

Hopefully the outlined procedure is helpful information and will give ideas on how to use this procedure to record and track useful information in ZIMS. This procedure has many applications to be used to track all different kinds of valuable information. Go now create.

Literature Cited

Species360 Zoological Information Management System (ZIMS) (2021). Zims.Species360.org